



10 Proven Ways to Win Employer Accounts

(WITHOUT SOUNDING LIKE EVERY OTHER BROKER)



It's a competitive market out there—so how can you break through the noise and stand out from the other agents? Clients have a lot more choices these days, but not a lot of time, so you need to be able to quickly leave a long-lasting impression.

1

LEAD WITH BUSINESS IMPACT, NOT BENEFITS JARGON

Frame your services around outcomes they care about—**retention, morale, and cost control**—not just “voluntary benefits.” Example: *“I help companies reduce turnover and increase employee satisfaction without increasing HR workload.”*

2

DIFFERENTIATE FROM THE STATUS QUO

Call out what typical brokers or carriers don't do, then show how you're different. Example: *“Most brokers disappear after enrollment. I stay involved year-round to make sure your benefits actually perform.”*

3

USE PROOF, NOT PROMISES

Bring one-pagers or short case studies with metrics. Bonus points for testimonials from your other clients. Example: *“Helped XYZ Co. get 74% enrollment with zero internal lift.”*

4

POSITION LIFE INSURANCE AS A STRATEGIC ASSET

Don't pitch it as a checkbox. Connect it to employee wellbeing and financial literacy. Example: *“Life insurance is often the only legacy-building tool your frontline workers will ever have access to.”*

5

SPEAK THEIR LANGUAGE (NOT YOURS)

Mirror the decision-maker's mindset. For HR: time savings and support. For CFO: cost containment and predictability. For founders: culture, retention, impact.

6

OFFER A TURNKEY, LOW-LIFT EXPERIENCE

Emphasize ease. Example: *"We handle the education, scheduling, and support. You stay in the loop but don't have to quarterback it."*

7

HIGHLIGHT PERSONALIZATION

Show how you tailor communication, education, and plan design to **their specific workforce**, not just plug in a standard plan.

8

BE PRESENT, BUT NOT PUSHY

Employers buy from people they trust. Schedule regular, short touchpoints, even outside enrollment season, to become a consistent, valued presence.

9

BUILD A SIGNATURE STYLE OR BRAND

Whether it's how you present, educate, or communicate, develop something unique and recognizable. This could be as simple as a signature phrase, a visual identity, or a branded "benefits playbook."

10

SELL THEM ON WHAT YOU UN-SELL

Credibility grows when you **ease back on products or carriers that might not be the best fit for their specific needs**. Example: *"We don't push what doesn't fit. If it's not right for your team, I'll say so."*

This tool is just the start.

Let's talk about how Boston Mutual Life supports brokers like you with enrollment strategies, marketing assets, and hands-on service your clients will remember.

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